

BSO Tutorial for Tax Year 2005

W-2 Online

Contains the following lessons:

- Create Forms W-2 Online
- Resume Unsubmitted Forms W-2
- <u>Download Submitted Forms W-2</u>

Lesson 1: Create Forms W-2 Online

Follow the instructions below to create up to 20 Forms W-2 online.

- **Step 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **Step 2**: Select the **Login** link on the Business Services Online Welcome page. The system displays the General Login Attestation page.



General Login Attestation

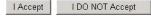
User Certification for SSA Business Services Online

I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

I certify that:

- I understand that I may be subject to penalties if I submit fraudulent information. I agree that I am responsible for all actions taken with my PIN.
- I am aware that any person who knowingly and willingly makes any representation to falsely obtain information from Social Security records and/or intends to deceive the Social Security Administration as to the true identity of an individual could be punished by a fine or imprisonment, or both.
- I am the individual authorized to do business under this PIN.

By selecting the "I Accept" button, you certify that you have read, understand and agree to the user certification of Business Services Online.



Step 3: Select the **I Accept** button after reading the conditions defined on the General Login Attestation page. The system displays the Business Services Online Login page.



- **Step 4**: Enter your PIN and password.
- **Step 5**: Select the **Login** button. The system displays the BSO Home page. (To return to the Business Services Online Welcome page, select the Cancel button.)
- Step 6: Select the Enter Forms W-2 for Tax Year 2005 link.
- ► Enter Forms W-2 for Tax Year 2005

Create, print, and submit your Forms W-2 and Form W-3 for Tax Year 2005. Fifty (50) reports can be entered at one time.

The system displays the Wage Reporting Attestation page.



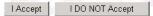
Wage Reporting Attestation

User Certification for Wage Reporting via the SSA Business Services Online

I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

I certify that I am the individual authorized to conduct business under this PIN and have the authority to either attest to the accuracy of the data and/or transmit wage information and to receive employee wage information for the employer.

By selecting the "I Accept" button, you certify that you have read, understand and agree to the user certification of Business Services Online.



Step 7: Select the **I Accept** button after reading the conditions defined on the Wage Reporting Attestation page. The system displays the W-2 Online Information for Tax Year 2005 page.





W-2 Online Information for Tax Year 2005

W-2 Online lets you create, print, and submit up to 20 Forms W-2 to the Social Security Administration. You may not use W-2 Online if any of the restrictions below apply to you.

Note: W-2 Online does not contain any Test features. Please do not submit any data you do not want processed by the Social Security Administration.

Data entered in boxes 15 through 20 on the Form W-2 will not be shown on the Form W-3. However, this data will be displayed on individual W-2s when printed. State data submitted to the Social Security Administration will not be furnished to the State.

You will need **Adobe Acrobat Reader** (version 5.0 is recommended) to print your Form W-3 and Forms W-2. Follow this link to go to Adobe's free download page.

BEFORE CONTINUING, YOU MUST:

- Read all restrictions carefully.
- · Verify your registration information.
- . Specify whether you are filing for yourself or another company.

When you have finished, select the Continue button at the bottom of this page.

The following RESTRICTIONS apply to all W-2 Reports:

- Agent Indicator Codes may not be filed using Forms W-2.
- Self-employed income recipients who are not paid wages by a church or religious organization should not file Forms W-2.

Note: Self-employment income and applicable taxes must be reported on the Internal Revenue Service Form Schedule SE, as required by the Internal Revenue Service. If you have questions on self-employment income and tax reporting, visit the Internal Revenue Service at www.irs.gov or call 1-800-829-1040. For TDD/TTY call 1-800-829-4059.

The following RESTRICTIONS apply only to W-2 Online:

- Do NOT use W-2 Online if you are attempting to file Forms W-2c.
- Do NOT use W-2 Online if you are filing for a tax year other than 2005.
- Do NOT use W-2 Online if you are filing for wages earned in American Samoa, Guam, Puerto Rico, the Northern Mariana Islands, or the Virgin Islands.
- Do NOT use W-2 Online if you are filing for United States military wages or using a military Employer Identification Number (EIN).
- Do not use W-2 Online if you are submitting DThird-party sick pay recap Forms W-2 and W-3D described in part 6 of Internal Revenue Service publication 15-A at www.irs.gov/pub/irs-pdf/p15a.pdf. A recap form is a special W-2 that does not contain an employee name or Social Security Number. Submit those on a paper form W-2 with a W-3.
- You may enter up to 20 Forms W-2 per Form W-3 using this system

REGISTRATION INFORMATION

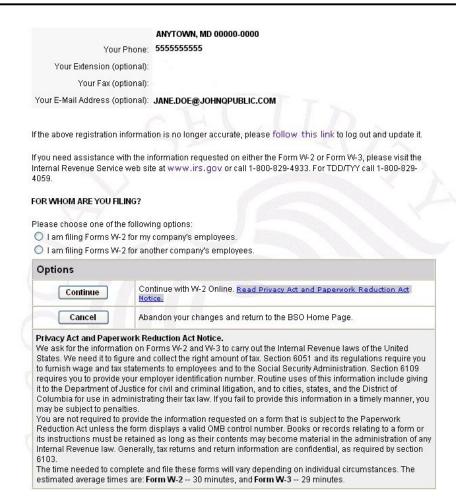
You provided the following contact information when you registered to use Business Services Online. This information will be saved with your annual wage report so that we can contact you if questions arise. Please check to be sure this information is correct.

Your Company's Name: JOHN Q. PUBLIC ENTERPRISES

Your Company's EIN: 01-0000000

Your Name: JANE DOE

Your Address: 123 ANYSTREET DR





If you have any existing unsubmitted reports, the system will display the W-2 Online Unsubmitted Reports for Tax Year 2005 page. For Tax Year 2005, you may have a maximum of 50 unsubmitted reports at one time. To start a new report, you must first submit an existing report. If there are 49 or fewer reports you may continue without submitting the existing reports by selecting the **Start a New Report** button. Refer to <u>Lesson 2: Resume Unsubmitted W-2s</u> for more information.

Step 8: Select the appropriate response for the **FOR WHOM ARE YOU FILING?** section after reviewing the registration information.



The FOR WHOM ARE YOU FILING? radio buttons are not available for self-employed users.

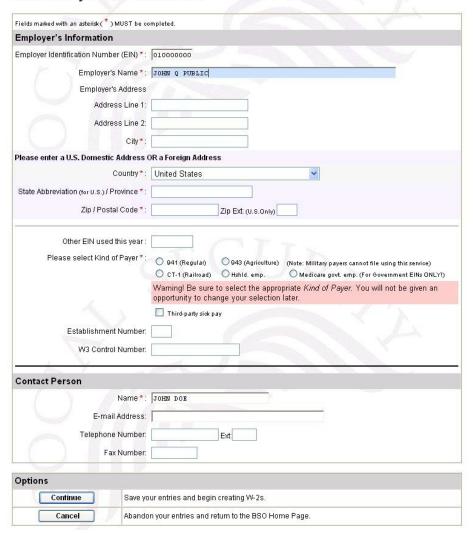
Step 9: Select the **Continue** button after reviewing the Privacy Act and Paperwork Reduction Act notice. The system displays the W-2 Online Employer Data for Tax Year 2005 page. (Otherwise, select the **Cancel** button to end this session and return to the BSO Home page.)



W-2 Online Help

W-2 Online Employer Data for Tax Year 2005

Please fill in your information below:



Step 10: Enter your employer information.

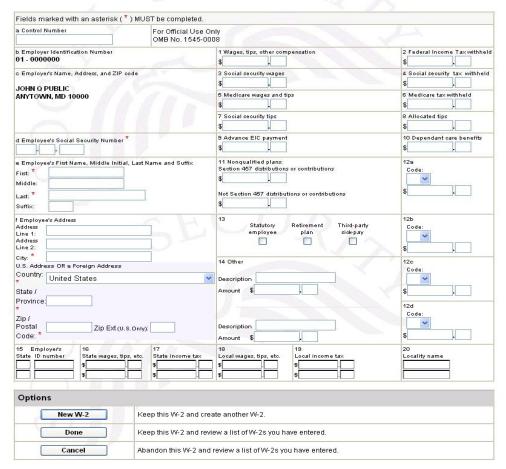


All fields marked with an asterisk must be completed. If you selected the "I am filing Forms W-2 for my company's employees" radio button, the company information is populated from the Social Security Administration's records, but you can change it if need be.

Step 11: Select the **Continue** button. The system displays the W-2 Online Form W-2 for Tax Year 2005 page. (Otherwise, select the **Cancel** button to exit and return to the BSO Home page.)



W-2 Online Form W-2 for Tax Year 2005

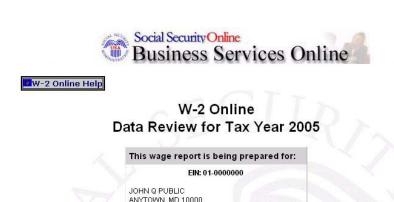


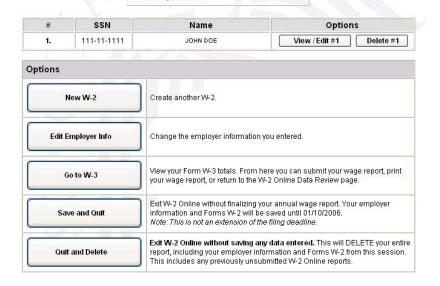
- **Step 12**: Enter the W-2 data in the appropriate boxes.
- Step 13: Select New W-2 to save this W-2 information and create another W-2. Select the **Done** button to save this W-2 information and proceed to the W-2 Online Data Review for Tax Year 2005 page. Select the **Cancel** button to delete entries made to this W-2 and proceed to the W-2 Online Data Review for Tax Tear 2005 page.



You can enter a maximum of 20 W-2s. When entering your 20^{th} W-2, the system will no longer display the **New W-2** button.

Step 14: After you select **New W-2** or **Done**, you may receive an alert. If so, you will need to review your data and make any corrections or select an override response for each alert. Then, select **Done** or **New W-2** to proceed to the W-2 Online Data Review for Tax Year 2005 page.





- **Step 15**: Select the **View/Edit** button next to the appropriate record to view or edit the W-2 data. If you want to delete the W-2 record, select the **Delete** button next to the appropriate record.
- Step 16: Select one of the following options: New W-2, Edit Employer Info, Go to W-3, Save & Quit, or Quit and Delete.



The New W-2 option will not be available if 20 W-2s are already saved for the current report. The Go to W-3 option will not be available if no saved W-2s exist for the current employer.

Step 17: Select the **Go to W-3** button to submit your wage data. The system will display the W-2 Online Form W-3 for Tax Year 2005 page.





W-2 Online Form W-3 for Tax Year 2005

a Control Number	For Official Use Only OMB No. 1545-0008			
b Kind of payer		1 Wages, tips, other compensation \$1,000.00	2 Federal Income Tax withheld \$200.00	
94	1 - Regular	3 Social security wages \$100.00	4 Social security tax withheld \$50.00	
C Total number of Forms W2	d Establishment number	5 Medicare wages and tips \$100.00	6 Medicare tax withheld \$50.00	
e Employer identification number	01-0000000	7 Social security tips \$0.00	8 Allocated tips \$0.00	
Employer's name, address, and ZIP code JOHN Q PUBLIC ANYTOWN, MD 10000		9 Advance EIC payment \$0.00	10 Dependant care benefits \$0.00	
		11 Nonqualified plans \$0.00	12 Deferred Compensation \$0.00	
		13 For third-party sick pay use only		
		14 Income tax withheld by payer of third-party sick pay		
h Other EIN used this year				
15 State Employer's state ID number		16 State wages, tips, etc.	17 State income tax	
		18 Local wages, tips, etc.	19 Local income tax	
Contact person	JOHN DOE	Telephone number 3017478531		
E-mail Address		Fax Number		

Options		
belief, they are true, correct, ar	clare that I have examined this return and accompanying documents and, to the best of my knowledge and id complete. By Selecting the "Submit Wage Report" button below, I affirm that the above statement is true ar e report to Social Security Administration now.	nd
	Submit this Tax Year 2005 wage report to the Social Security Administration.	/
Submit Wage Report	Your Form W-3 must reconcile with the Forms 941, 943, or Schedule H that you filed with the Internal Revenue Service. Note: You will be given an opportunity to download a data file needed to print your Form W-3 and Forms W-2.	
	No test feature is provided for W-2 Online. Selecting this button will cause your data to be submitted.	
Print Wage Report	Print your unsubmitted Tax Year 2005 wage report. Note: Selecting this option will not submit your wage report to the Social Security Administration.	
Return to W-2 Online Data Review Page	Return to the W-2 Online Data Review Page to review and/or edit your wage report.	

Step 18: Select one of the following options:

Submit Wage Report button to submit your wage information. Go to <u>Step 19</u> for more information.

Print Wage Report button to print or preview your wage report prior to submitting it to SSA. Go to Step 23 for more information.

Return to W-2 Online Data Review Page button to edit your data.

Step 19: Select the **Submit Wage Report** button on the W-2 Online Form W-3 for Tax Year 2005 page. The system submits your W-2/W-3 wage data and displays the W-2 Online Receipt Acknowledgement for Tax Year 2005 page along with the print pop-up window. Select the **OK** button to print the W-2 Online Receipt Acknowledgment for Tax Year 2005 page.



Otherwise, select the **Cancel** button to close the pop-up window.





W-2 Online Receipt Acknowledgment for Tax Year 2005

Date: 01-Nov-05 Time: 01:16 PM Eastern Time

Your Annual Wage Report has been submitted to the Social Security Administration.

Please do not send us paper forms.

This annual wage report was submitted for:

Employer Name: JOHN Q PUBLIC EIN: 010000000

Your Wage File Identifier (WFID) is KVM310.

The WFID is a number associated to your submission for tracking purposes. You can check on the status of your submission by selecting *View Submission Status / Errors / Notice Information* on the BSO Home Page and looking for this WFID.

IMPORTANT! Do the following before proceeding:

- 1. Use your browser menu to save or print this acknowledgment of receipt for your records.
- 2. Right-click on the file link below (or tab to it and press Shift + F10) and select Save As to download your W-2 / W-3 file. Depending on your computer's configuration, this download could take 5 minutes or longer. You will need Adobe Acrobat Reader to print your Forms W-2 and Form W-3. Acrobat Reader version 5.0 is recommended. If this software is not installed on your computer, follow this link to download it from Adobe's free download page. Note: You can also open the file in Acrobat Reader from its current location without downloading it. To open the file from its current location, left-click on the file link (or tab to it and press Enter).

Employers are required by law to keep copies of Forms W-2 and W-3 for 4 years. This file will continue to be available through **12/01/2005** by selecting *Download Submitted W-2s* from the BSO Home Page. After this date, it will be discarded.

KVM310.pdf

For Employer records only! Do not send this form to the Social Security Administration.

The information contained on this form was submitted to the Social Security Administration on 01-Nov-05

The Wage File ID (WFID) assigned to this submission is KVM310.

Continue

- **Step 20**: Right-click the file link to save the wage file.
- **Step 21**: Select **Save Target As** option from the browser menu to save the file. (Otherwise, select the **Continue** button.)



Your wage file will be available for you to review under your BSO account until the date displayed on your W-2 Online Receipt Acknowledgement.

Step 22: Select the **Continue** button. The system displays the W-2 Online Thank You page.



W-2 Online Help

W-2 Online Thank You

Thank you for using W-2 Online.

If you have not saved your file, right-click on the filename below (or tab to it and press Shift + F10) and select Save As to save your Form W-3 and Form W-2 information on your computer.

KVM310.pdf

This file will continue to be available through **12/01/2005** by selecting 'Download Submitted W-2s' from the BSO Home Page.

After you have saved your file, follow this link to download Adobe Acrobat Reader if this software is not already installed on your computer. You will need Adobe Acrobat Reader (version 5.0 is recommended) to print your Form W-3 and Forms W-2.

BSO Home

Step 23: Select the **Print Wage Report** button on the W-2 Online Form W-3 for Tax Year 2005 page to print the wage report. The system displays the W-2 Online Report Print page.





W-2 Online Report Print

Your annual wage report has NOT been submitted to the Social Security Administration.

You can view, print, or save your Form W-3 and Forms W-2 using Adobe Acrobat Reader (version 5.0 is recommended).

If the above software is already installed on your computer, select the *Print Preview* link below to open it with Acrobat Reader.

Print Preview

Assistive Technology / Keyboard Users - Select this link to review Forms W-2 in HTML Format

If the above software is not already installed on your computer:

- 1. Right-click on the Print Preview link (or tab to it and press Shift + F10).
- 2. Select Save As to save your Form W-3 and Form W-2 information on your computer.

Depending on your computer's configuration, this download could take 5 minutes or longer. After you have saved your file, follow this link to download Acrobat Reader from Adobe's free download page.

Options Under penalties of perjury, I declare that I have examined this return and accompanying documents and, to the best of my knowledge and belief, they are true, correct, and complete. By selecting the Submit Wage Report button below, I affirm that the above statement is true and wish to submit my annual wage report to the Social Security Administration Submit this Tax Year 2005 wage report to the Social Security Administration. Your Form W-3 must reconcile with the Forms 941, 943, or Schedule H that you Submit Wage Report filed with the Internal Revenue Service. Note: You will be given an opportunity to download a data file needed to print your Form W-3 and Forms W-2. View your Form W-3 totals. Return to W-3 From here you can submit your annual wage report, print your wage report, or return to the W-2 Online Data Review Page. Return to W-2 Return to the W-2 Online Data Review page to review and/or edit your wage Online Data Review Page Exit W-2 Online without finalizing your annual wage report. Save & Quit Your employer information and Forms W-2 will be saved until 01/30/2006. Note: This is not an extension of the filing deadline Exit W-2 Online without saving any data entered. This will DELETE your entire **Quit and Delete** report, including your employer information and Forms W-2 from this session. This includes any previously unsubmitted W-2 Online reports.



If you do not have Adobe Acrobat Reader on your computer, you can download it by selecting "follow this link" near the middle of the page.

- **Step 24**: Select the **Print Preview** link. The system displays the Forms W-2.
- Step 25: Select File>Print from the menu bar or select the Print icon from the tool bar.
- **Step 26**: Select **File>Close** on the menu bar after printing to close the window. The system returns you to the W-2 Online Report Print page.
- **Step 27**: Select one of the following options on the W-2 Online Report Print page:

Submit Wage Report button to send the W-2/W-3 data to the Social Security Administration.

Return to W-3 button to return to the W-2 Online Form W-3 for Tax Year 2005 page.

Return to W-2 Online Data Review button to return to the W-2 Online Data Review for Tax Year 2005 page.

Save & Quit button to save the W-2/W-3 data you have entered. The system will display the Are you sure you want to save and exit W-2 Online without finalizing your annual wage report? page. Select the **Yes** button to save and quit, and return to the BSO Home page. Select the **No** button to return to the W-2 Online Data Review for Tax Year 2005 page.

Quit & Delete button to exit W-2 Online without saving any data entered. You will be given the opportunity to confirm that you wish to quit and delete the wage report on the WARNING: This will DELETE your entire annual wage report page. Select the **Yes** button to delete the entire wage report. Select the **No** button to return to the W-2 Online Data Review for Tax Year 2005 page.

Lesson 2: Resume Unsubmitted Forms W-2

Follow the instructions below to continue working with W-2 Online reports that you have saved but not yet submitted. SSA will delete any saved reports that you do not submit or update within 90 days. All unsubmitted Forms W-2 will be removed on December 9, 2006.



You may have up to 50 saved reports. Each report may contain up to 20 Forms W-2. If you have any unsubmitted reports, the system will automatically display a list of the unsubmitted W-2s upon entering W-2 Online.

- **Step 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **Step 2**: Select the **Login** link on the Business Services Online Welcome page. The system displays the General Login Attestation page.



General Login Attestation

User Certification for SSA Business Services Online

I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

I certify that:

- I understand that I may be subject to penalties if I submit fraudulent information. I agree that I am responsible for all actions taken with my PIN.
- I am aware that any person who knowingly and willingly makes any representation to falsely obtain information from Social Security records and/or intends to deceive the Social Security Administration as to the true identity of an individual could be punished by a fine or imprisonment, or both.
- . I am the individual authorized to do business under this PIN.

By selecting the "I Accept" button, you certify that you have read, understand and agree to the user certification of Business Services

I Accept I DO NOT Accept

Step 3: Select the **I Accept** button after reading the conditions defined on the General Login Attestation page. The system displays the Business Services Online Login page.



- **Step 4**: Enter your PIN and password.
- **Step 5**: Select the **Login** button to display the main menu. The system displays the BSO Home page. (To return to the Business Services Online Welcome page, select the **Cancel** button.)
- **Step 6**: Select the **Resume Unsubmitted W-2s** link.
- ► Resume Unsubmitted W-2s
 Continue processing your unsubmitted W-2s.

The system displays the Wage Reporting Attestation page.

Online



Step 7: Select the I Accept button after reading the conditions on the Wage Reporting Attestation page. The system displays the W-2 Online Unsubmitted Reports for Tax Year 2005 page.



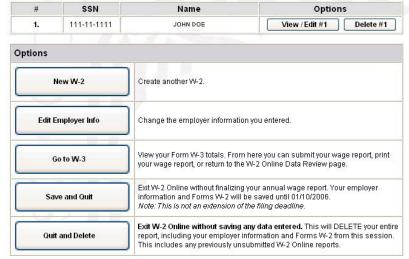
Step 8: Select the View/Edit button for the specific report to view or modify the report. The system displays the W-2 Online Data Review for Tax Year 2005 page. (To delete the report, select the **Delete** button for the specific report.)





W-2 Online Data Review for Tax Year 2005







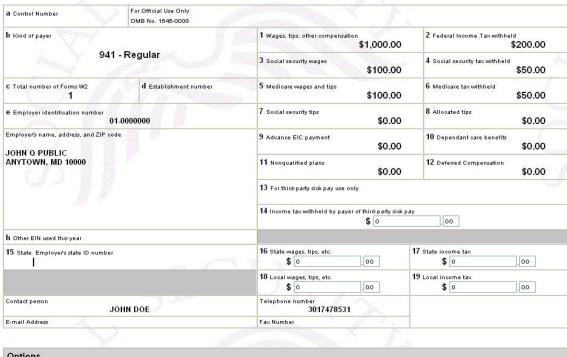
The New W-2 button (on the W-2 Online Data Review page for Tax Year 2005 page) will not be displayed if you have the maximum number of unsubmitted W-2s (20) per report.

Step 9: Select the **Go to W-3** button. The system displays the W-2 Online Form W-3 for Tax Year 2005 page.





W-2 Online Form W-3 for Tax Year 2005



clare that I have examined this return and accompanying documents and, to the best of my knowledge and d complete. By Selecting the "Submit Wage Report" button below, I affirm that the above statement is true a report to Social Security Administration now.	and
Submit this Tax Year 2005 wage report to the Social Security Administration.	
Your Form W-3 must reconcile with the Forms 941, 943, or Schedule H that you filed with the Internal Revenue Service.	
No test feature is provided for W-2 Online. Selecting this button will cause your data to be submitted.	
Print your unsubmitted Tax Year 2005 wage report.	
Note: Selecting this option will not submit your wage report to the Social Security Administration.	
Return to the W-2 Online Data Review Page to review and/or edit your wage report.	
	report to Social Security Administration now. Submit this Tax Year 2005 wage report to the Social Security Administration. Your Form W-3 must reconcile with the Forms 941, 943, or Schedule H that you filed with the Internal Revenue Service. Note: You will be given an opportunity to download a data file needed to print your Form W-3 and Forms W-2. No test feature is provided for W-2 Online. Selecting this button will cause your data to be submitted. Print your unsubmitted Tax Year 2005 wage report. Note: Selecting this option will not submit your wage report to the Social Security Administration.

Step 10: Select one of the following options on the W-2 Form W-3 for Tax Year 2005 page:

Submit Wage Report button to send the W-2/W-3 data to the Social Security Administration.

Print Wage Report button to print your unsubmitted wage report from the W-2 Online Report Print page.

Lesson 3: Download Submitted Forms W-2

Follow the instructions below to download an Adobe file containing Forms W-2 and W-3 for a W-2 Online report submitted within the last 30 days.



Submitted wage report files are available for 30 days or until December 9, 2006, whichever comes first.

- **Step 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **Step 2**: Select the **Login** link on the BSO Welcome page. The system displays the General Login Attestation page.



General Login Attestation

User Certification for SSA Business Services Online

I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

I certify that:

- I understand that I may be subject to penalties if I submit fraudulent information. I agree that I am responsible for all actions taken with my PIN.
- I am aware that any person who knowingly and willingly makes any representation to falsely obtain information from Social Security records and/or intends to deceive the Social Security Administration as to the true identity of an individual could be punished by a fine or imprisonment, or both.
- . I am the individual authorized to do business under this PIN.

By selecting the "I Accept" button, you certify that you have read, understand and agree to the user certification of Business Services



Step 3: Select the **I Accept** button after reading the conditions defined on the General Login Attestation page. The system displays the Business Services Online Login page.



- **Step 4**: Enter your PIN and password.
- Step 5: Select the Login button to display the main menu. The system displays the BSO Home page. (To return to the BSO Welcome page, select the Cancel button.)
- Step 6: Select the Download Submitted W-2s link.
 - Download Submitted W-2s
 Download a Intable version of your submitted Forms W-2 and Form W-3. This printable version can be saved to your PC. (This feature is only available for Forms W-2 and Form W-3 created with W-2 Online within 30 days of the date of submission).

The system displays the Wage Reporting Attestation page.



Wage Reporting Attestation

User Certification for Wage Reporting via the SSA Business Services Online

I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

I certify that I am the individual authorized to conduct business under this PIN and have the authority to either attest to the accuracy of the data and/or transmit wage information and to receive employee wage information for the employer.

By selecting the "I Accept" button, you certify that you have read, understand and agree to the user certification of Business Services Online.

I Accept I DO NOT Accept

Step 7: Select the **I Accept** button after reading the conditions defined on the Wage Reporting Attestation page. The system displays the W-2 Online Download for Tax Year 2005 page.

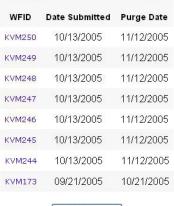


W-2 Online Help

W-2 Online Download for Tax Year 2005

Right-click on the WFID (or tab to it and press Shift + F10) and select Save As to download your W-2 / W-3 file. Depending on your computer's configuration, this download could take 5 minutes or longer. You will need Adobe Acrobat Reader to print your Forms W-2 and Form W-3. Acrobat Reader version 5.0 is recommended. If this software is not installed on your computer, follow this link to download it from Adobe's free download page.

Note: You can also open the file in Acrobat Reader from its current location without downloading it. To open the file from its current location, left-click on the WFID (or tab to it and press Enter).



BSO Home

- **Step 8**: Right-click the WFID link you wish to download.
- Step 9: Select the Save Target As option from the browser menu to download the file onto your computer. If you wish to view the file before choosing to save, instead select **Open in New Window**.



Adobe Acrobat Reader is required to view your downloaded wage file. If you do not have Adobe Acrobat Reader on your computer, you can download it by pointing your browser to www.adobe.com.

Step 10: Select the **BSO Home** link to return to the BSO Home page.